



## Excel Care

Expertise. Experience. Results.

# OUR PROCESS

At Excel Care our goal for our clients is to promote independence. We are committed to assisting clients to recognize their potential and achieve their rehabilitation goals. Below you will find an outline of our process for rehabilitation and case management.

### STEP 1 REQUEST FROM LAWYER

- A) Complete the Excel Care Referral Form
- B) Compose a letter for Excel Care outlining your request, with a copy going to the client
- C) Permission to Disclose Health Information (OCF-5) Form: completed and signed by the client
- D) Excel Care Consent Form: to be signed by the client allowing us to communicate with their, Doctor(s), Insurance, and any extended health carriers
- E) Medical Brief: In order to get a full background we request a medical brief of the Client previous and current and previous background so that we can build a timeline of events

### STEP 2 FINANCIAL APPROVAL

- A) An introduction phone call will be made to your Client to review request and to explain our services
- B) A Treatment and Assessment Plan (OCF-18) will be prepared and reviewed with the Client
- C) Excel Care will contact the Client to review the OCF-18. Once reviewed we ask for verbal permission and signatures of the OCF-18 for submission to their insurer

APPROVAL	DENIAL
Excel Care proceeds with the Nursing Assessment: An assessment will be conducted to determine the level of care and/or the clients rehabilitation needs. The Ontario College of Nurses Decision Tree will guide this Nursing Assessment	Excel Care will contact the client’s Legal Representative and Client to communicate further possible solutions, and to receive direction as to how to proceed.
Excel Care to prepare and submit Nursing Assessment report followed by our recommendations to the Client, Insurer, and Legal Representative	
Excel Care builds and implements the Rehabilitation Team	